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FFVS 1-56 February 27, 1956

FRANCE: ANNUAL SEED REPORT

The following Circular 1/ is based upon an annual report received by the Foreign Agricultural Service from Paris, France. The fact that the report represents the first attempt at complete coverage of the forage seed situation in France has prompted its reproduction in circular form, with only minor revisions. The reader of the report should be mindful of the fact that it was written prior to the onset of exceptionally severe winter weather and that any forecasts of supply and distribution may require substantial revision.

Summary.- French 1955 production of forage crop seeds was generally good. Usual fall exports of crimson clover seed to the U.S. are completed, but considerable difficulty was encountered with low germination which resulted in some lots being refused entry. Alfalfa seed production was normal with an exportable surplus in contrast with the small 1954 crop which resulted in the need to import seed for 1955 spring seeding.

Supply and Distribution.- Estimates for 1955 production of forage crop seeds provided by the Forage Seed Trade Association are shown in Table 1. For the first time the Association attempted to estimate the total crop rather than only the commercial crop as had been its practice in the past. Carry-over data of seeds as of July 1, 1955 also are shown. In general, production of seeds was satisfactory during 1955 and requirements will be covered to a large extent from domestic production.

Although many of the seed crops listed in Table 1 are not of great significance in trade with the United States, the complete list is included since it was made available by the Trade Association. The only seed of some interest not included is hybrid seed corn, limited quantities of which are imported from the United States in some years. Data on seed corn are not presently available but it seems unlikely at this time that any seed corn will be imported from the United States next year.

It should be emphasized that estimates of domestic requirements and resultant import requirements shown in Table 1 are theoretical and do not necessarily indicate that the given quantity of seed will be imported. Imports of seeds from the dollar area are permitted only when the need is proved by the Trade Association and when appropriate kinds of seed are not available from other sources.

1/ This is the FIRST of a series of Foreign Field and Vegetable Seeds CIRCULARS to be issued by the Grain and Feed Division, Foreign Agricultural Service.

Table 1 - Forage Crop Seeds: Carryover, Production, Requirements and Exportable Surplus, France

Kind of Seed	Carryover July 1,1955	Production 1955	Domestic Requirements	Exportable Surplus	Import Requirements
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Red Clover	441	44,092	22,046	22,487	-
Crimson Clover	661	16,534	9,921	7,275	-
Alsike	110	441	2,205	-	1,653
White	22	110	441	-	309
Birdsfoot Trefoil	661	3,307	2,205	1,764	-
Alfalfa	441	24,251	17,637	7,055	-
Trefoil	110	3,307	3,307	110	-
Sainfoin	1,102	16,534	16,534	1,102	-
"Serradelle"	66	661	441	220	-
English Rye Grass	220	0	4,409	-	4,189
Italian Rye Grass	661	4,409	3,307	1,764	-
Tall Oatgrass	66	1,102	331	838	-
Orchard Grass	44	110	441	-	287
Redtop	0	0	88	-	88
Fescue	0	0	220	-	220
Timothy	0	0	551	-	551
Ky. Blue Grass	0	0	110	-	110
Vetches	1,102	33,069	17,637	16,534	-
Forage Peas	110	2,205	2,205	110	-
Golden Oats	0	4	-	-	-

Source: Forage Seed Trade Association.

The supply and distribution of principal forage crop seeds of interest to the United States trade during the 1954-55 July-June crop year are shown in Table 2. These estimates were supplied by the Forage Seed Trade Association and apply to the commercial part of the crop only. Unfortunately, statistics for the two years cannot be compared directly since the Trade Association has not estimated commercial production and consumption for 1955-56 or total production and consumption for 1954-55. However, exports during 1954-55 can be compared with export availability for 1955-56 to give a rough approximation of the difference in the size of the crops of the two years.

Table 2 - Supply and Distribution of Certain Forage Crop Seeds, 1954-55 Crop Year, France (Commercial Crop Only)

Item	Alfalfa	Red Clover	Crimson Clover	Italian Ryegrass
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Carryover	441	661	1,102	441
Production	11,023	13,228	8,818	2,205
Imports	353	0	0	4,336
SUPPLY	11,817	13,889	9,920	6,982
Consumption	9,017	7,937	4,850	4,495
Exports	2,359	5,512	4,409	1,825
Carryout	441	441	661	661
TOTAL	11,817	13,890	9,920	6,981

Source: Forage Seed Trade Association.

The production and consumption of forage seeds for the 1955-56 year have been forecast by the Forage Seed Trade Association as shown in Table 3. It should be noted that forecasts of production and consumption are intended to cover the total crop and not the commercial crop as was the case in past years and in Table 2. As far as it is known imports of these seeds will be negligible.

Table 3 - Forecast of Total Supply and Distribution of Forage Crop Seeds, 1955-56 Crop Year, France

Item	Alfalfa	Red Clover	Crimson Clover	Italian Ryegrass
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Carryover	441	441	661	661
Production	24,251	44,092	16,534	4,409
Imports	0	0	0	0
SUPPLY	24,692	44,533	17,195	5,070
Consumption	17,637	22,046	9,921	3,307
Available for Export & Carryout	7,055	22,487	7,275	1,764
TOTAL	24,692	44,533	17,196	5,071

Production.- No estimates of acreage or production of seeds by kind are made by the Ministry of Agriculture. Estimates of the 1955 crops of forage seeds provided by the Trade Association are shown in Table 1. In the case of alfalfa and clovers, seed is produced on meadows from which one or two crops of hay have already been cut. The Trade Association generally does not attempt to estimate acreage harvested for seed.

Production of alfalfa seed, of interest to the U.S. trade, varies considerably depending on the price of seed in August. If it appears that the price will be favorable, farmers leave more of their alfalfa acreage for seed and reduce the last cutting of hay accordingly. In the case of crimson clover, producers of seed are more specialized and the acreage devoted to this seed crop varies less from year to year.

Foreign Trade.- Exports and imports of forage seeds during the 1954-55 marketing year (July-June) as reported by the Trade Association are shown in Table 4. This table does not give country of destination but does show breakdown by species and variety to a greater extent than do statistics from the Customs Bureau. Customs statistics are shown in Table 5 with country of origin and destination.

The principal French seed export to the United States is crimson clover. This seed is shipped immediately after being harvested in August or September and this creates some difficulties with regard to handling and germination. Considerable difficulty was experienced this year with lots of seed not being permitted entry into the United States because of low germination. A controversy arose over the testing methods used since the seed was tested by laboratories in Paris and Zurich before shipment. In most cases a considerable difference in test results occurred between samples tested in Europe and in the United States. This often was due to slight difference in methods, although presumably all stations were using the standard internationally agreed methods. Some of it may have been due to deterioration of the seed during shipment. Most of the lots were resampled and retested in the United States at the request of the shipper or the importer and many of the lots were finally permitted entry. However, some lots were shipped back to France and further germination tests will be made of the unacceptable lots in order to learn where the difference in methods and interpretation of results occurred.

A meeting of the International Seed Testing Association is scheduled for Paris in the summer of 1956. The meeting will be sponsored by the French Seed Trade Association and plans are being made for its financing. At one time it appeared that the Trade Association would not sponsor the meeting due to exporters' disappointment over the failure of many shipments of crimson clover seed to be permitted entry into the United States. However, after retesting and the approval of entry of several of the controversial lots, the trade calmed down and it is believed that relationships can be considered about normal again.

Table 4.- Foreign Trade in Forage Crop Seeds, 1954-55 Season, France, according to Trade Statistics.

Kind of Seed	Imports	Exports
	1,000 pounds	1,000 pounds
Red Clover	0	5,512
Crimson Clover	0	4,409
Alsike Clover	93	419
White Clover	331	60
Birdsfoot Trefoil	88	948
Alfalfa	353	2,359
Trefoil	101	948
Sainfoin	37	728
"Serradelle"	55	209
English Rye Grass	2,127	75
Italian Rye Grass	4,336	1,825
Tall Oat Grass	66	703
Orchard	476	95
Redtop	132	9
Fescue	220	9
Timothy	375	11
Ky. Blue Grass	121	2
Vetches	1,969	1,534
Forage Peas	55	22
Golden Oats	-	4

Source: Forage Seed Trade Association.

Table 5 - Imports and Exports of Forage Crop Seeds, 1954-55 Crop Year by Halves, and July-October 1955

Item and Country	1954-55			First 4 Months 1955-56
	2nd Half 1954	1st Half 1955	Total 1954-55	
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
I. IMPORTS				
Vetch and Lupine				
Italy	-	-	-	284
Hungary	348	108	456	0
Netherlands	231	653	884	216
Turkey	725	143	869	0
Belgium-Luxembourg	66	-	66	207
Algeria	2,454	705	3,159	882
Tunisia	1,510	765	2,275	49
Lebanon	635	633	1,268	1,878
Syria	139	1,488	1,627	913

(cont'd)

Table 5 - (continued)

Others	214	353	567	95
TOTAL	6,322	4,848	11,171	4,524
Clover Seed				
United Kingdom	0	55	55	0
Italy	95	243	337	33
Netherlands	108	75	183	9
Tunisia	165	0	165	4
Morocco	55	44	99	2
Israel	0	88	88	0
Others	115	198	313	128
TOTAL	538	703	1,240	176
Alfalfa				
United States	0	348	348	0
Denmark	44	0	44	0
Others	26	33	60	0
TOTAL	70	381	452	0
Rye Grass				
United States	1,091	1,887	2,978	26
United Kingdom	597	994	1,592	190
Netherlands	930	1,570	2,500	4
Italy	254	0	254	64
Others	75	410	485	82
TOTAL	2,947	4,861	7,809	366
Other Forage Seeds				
United States	181	377	558	35
West Germany	15	192	207	11
Denmark	207	970	1,177	123
Netherlands	192	207	399	9
Italy	0	342	342	0
Lebanon	635	615	1,250	249
Syria	492	362	853	20
Morocco	470	635	1,105	203
Others	265	551	816	179
TOTAL	2,457	4,251	6,707	829

(cont'd)

Table 5 - (continued)

II, EXPORTS				
Vetch and Lupine				
United States	33	0	33	348
West Germany	132	139	271	516
East Zone Germany	573	0	573	0
Finland	0	763	763	0
Czechoslovakia	108	192	300	44
Algeria	1,345	44	1,389	1,056
Others	126	289	414	229
TOTAL	2,317	1,427	3,743	2,193
Clover Seed				
United States	2,496	55	2,551	3,823
West Germany	5,384	126	5,509	496
United Kingdom	670	141	811	15
Italy	547	24	571	2,840
Netherlands	205	55	260	33
Switzerland	240	0	240	35
Belgium-Luxembourg	529	132	661	68
Others	551	227	778	62
TOTAL	10,622	760	11,381	7,372
Alfalfa				
West Germany	265	79	344	0
Italy	238	0	238	0
Denmark	24	238	262	0
United Kingdom	214	269	483	0
Switzerland	247	0	247	0
Belgium-Luxembourg	55	176	231	0
Chile	15	152	168	0
Uruguay	112	64	176	33
Others	168	448	615	51
TOTAL	1,338	1,426	2,764	84
Rye Grass				
West Germany	112	55	168	0
United Kingdom	633	437	1,069	0
Ireland	179	130	309	0
Italy	53	0	53	0
Others	121	88	209	49
TOTAL	1,098	710	1,808	49

(cont'd)

Table 5 - (continued)

Other Forage Seed				
United States	121	271	392	0
West Germany	509	225	734	0
Denmark	130	51	181	0
United Kingdom	174	267	441	0
Hungary	0	335	335	0
Netherlands	317	55	373	0
Italy	35	33	68	342
Switzerland	88	478	567	4
Argentina	2	88	90	24
Turkey	55	0	55	0
Others	128	291	419	55
TOTAL	1,559	2,094	3,655	425

Source: Ministry of Finance, Customs Bureau.

Prices.- Prices of principal forage crop seeds are shown in Table 6. These are wholesale prices and generally apply to F.O.B. shipping point in the producing area. They are roughly equal to export prices. Approximately 350 francs are equal to one U.S. dollar.

Table 6 - Mid-month Prices of Certain Forage Seeds at the Bourse de Commerce, Paris, August-December 1955

Item	August	September	October	November	December
	Cents per lb.	Cents per lb.	Cents per lb.	Cents per lb.	Cents per lb.
Clover					
Red clover	17.2-17.7	16.8-19.4	15.5-18.1	17.5-18.1	18.8-20.1
" (clean)	29.8-31.1	23.3-24.0	19.0-20.1	19.4-19.8	20.5-20.7
White	23.7-25.3	20.7	-	-	-
Crimson	21.4-21.8	15.5-19.4	-	-	-
Vetch					
Winter	7.8	7.8	7.5- 7.8	7.8	7.8- 8.2
Sainfoin	5.8	4.4- 4.8	4.5- 4.9	4.9- 5.2	4.9- 5.2
Trefoil					
Yellow	15.5-16.8	15.5-16.2	16.8-17.5	17.5-18.1	16.8-18.1
Alfalfa	31.7-32.4	30.4-33.7	-	24.6-27.2	25.9-29.1
Trefoil					
Birdsfoot	-	20.7-25.9	22.0-27.2	23.3-29.1	25.9-30.4
Italian					
Ryegrass	-	-	7.8-10.4	7.8-10.4	7.8-10.4

Source: Trade Publication "Le Courrier du Commerce".

Outlook.- Imports of seeds from the United States are not possible without an import license. Such licenses and the necessary foreign exchange are not normally given directly to private seed importers, but to the Seed Trade Association which divides the license among its members. However, in the past when the Trade Association has applied to the French Government for necessary authority to import seeds from the United States it has usually been granted. Of course, the Trade Association does not apply for such authority unless seed cannot be obtained from O.E.E.C. countries or countries with which France has bilateral trade agreements.

Crimson Clover Seed.- A rather large crop of crimson clover seed was harvested in 1955 and exports were larger than usual. Export shipments were made in the early fall and have been completed for some time. The total quantity exported has not yet been reported by the Trade Association. It is too early, of course, to speculate on the size of the 1956 crop.

Alfalfa Seed.- A normal crop of alfalfa seed was harvested and over 3,000 tons are available for export. There appears to be no likelihood of a shortage of seed in the spring of 1956 similar to that of the spring of 1955 when some seed was imported from the United States. On the contrary, some alfalfa seed is expected to be sold to the United States this season, in particular the Dupuits variety.